



**The QEII is here for you.**



## **INSTRUCTIONS FOR A GIFT OF PUBLICLY LISTED SECURITIES**

A donation of publicly listed securities allows you to support healthcare excellence at the QEII Health Sciences Centre and take advantage of the elimination of capital gains tax on the donated securities.

### **Electronic Transfer**

- Please contact the QEII Health Sciences Centre Foundation office at 902 334 1546 prior to your planned transfer of securities to discuss the securities being considered and the purpose of your gift.
- Your broker can arrange for the electronic transfer of your shares to our account. The Foundation's account custodian is:

**BMO Nesbitt Burns  
Attention: Mark Elliott  
1675 Grafton Street, 14th floor  
Halifax, NS B3J 0E9  
Tel 902 496 1167 Fax 902 423 7011  
Toll free 1 800 841 7993  
mark.elliott@nbpcd.com**

**Your broker will need the following account numbers for the transfer:**

**FINS - # T009  
Account - # 28011741-17  
CUID - # NTD  
Broker Rep - # AHL  
DTC - #5043 (for U.S. Transactions only)**

- Your broker will require written instructions from you authorizing the transfer. A sample letter is attached.
- It is important to notify us prior to giving instructions to your broker to transfer the securities. This ensures the securities can be easily identified by our account custodian and avoids delays in processing your donation.
- We will need you to provide us with the name and contact information of your broker, the type of securities being transferred and the number of shares or units.

**Please note:** The value of your donation receipt will be based on the closing bid price on the day the securities are received in the Foundation's account through our custodian.

### Physical Delivery of Securities Certificates

- Please contact the QEII Health Sciences Centre Foundation office at 902 334 1546 to discuss the securities being considered, the purpose of your gift and the transfer process.
- The certificates may be delivered or sent by registered mail to the Queen Elizabeth II Health Sciences Centre Foundation at the following address:

**5657 Spring Garden Road  
Park Lane Mall, Floor M3, Box 231  
Halifax, NS B3J 3R4**

- When mailing the documents to our office the certificates and power of attorney form should be mailed separately. Please use registered mail for the certificates.
- The Power of Attorney form (sample attached) must be completed to transfer the securities certificates to us. This form must be signed exactly in the same manner as the certificates and your signature must be guaranteed by your banker, trust company or a member of the Toronto, Montreal or New York Stock Exchange. ***Please do not complete the transfer form on the reverse of the securities certificate(s) as this will place the securities in bearer form.***
- Please note that the legal name of the Foundation is: **Queen Elizabeth II Health Sciences Centre Foundation**
- ***The value of the donation receipt is based on the closing bid price on the day the Foundation office physically receives the certificate(s).*** In the case of certificate(s) sent by registered mail, this date will correspond to the date of our physical possession of certificate(s).

Thank you for your generous support of health care at the QEII Health Sciences Centre. Please do not hesitate to contact the Foundation should you require any assistance or information.

**QEII Health Sciences Centre Foundation  
5657 Spring Garden Road  
Park Lane Mall, Floor M3, Box 231  
Halifax, NS B3J 3R4  
902 334 1546  
info@qe2foundation.ca  
QE2Foundation.ca**

**Charitable Business No: 88646 3496 RR0001**

Sample letter to broker authorizing transfer of securities

To:

\_\_\_\_\_  
Name and address of broker/delivering custodian

Dear \_\_\_\_\_,

I hereby give authority to deliver free as a charitable gift the following securities from my account # \_\_\_\_\_ to BMO Nesbitt Burns (CUID # NTD) to the attention of Mark Elliott for credit to Queen Elizabeth II Health Sciences Centre Foundation of Halifax, NS, account # 28011741-17. I am enclosing QEII Foundation account and contact details for your information.

Thank you.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Full name (please print)

\_\_\_\_\_  
Telephone #

\_\_\_\_\_  
Address

\_\_\_\_\_  
Date

Securities:

1. Full Name of Security: \_\_\_\_\_

\*CUIP# \_\_\_\_\_

Number of Shares/Units: \_\_\_\_\_

2. Full Name of Security: \_\_\_\_\_

\*CUIP# \_\_\_\_\_

Number of Shares/Units: \_\_\_\_\_

3. Full Name of Security: \_\_\_\_\_

\*CUIP# \_\_\_\_\_

Number of Shares/Units: \_\_\_\_\_